Project Execution - PM Elements

Project Reviewing

Review Process

Just as tracking and monitoring are critical to controlling a project, so too is reviewing. One of the major causes of a project getting off track is the lack of attention to:

- Formal and consistent project reviews
- Setting up and using informal assessment methods

The focus of project reviews is to ensure that information is being shared and communicated. Where tracking and monitoring focused on the process of measuring actual project performance to the baseline, reviewing focuses on sharing that data and other related information with the project team and stakeholders throughout the project.

As in all other areas of project management, the review process needs to be tailored to the specific project. There is no right formula for defining the type and frequency of project reviews. However, there are some minimum activities that should be performed, such as:

- Status meetings should be held and attended by project team members responsible for key project organization and deliverables. These types of meetings are usually held weekly or biweekly.
- Executive Reviews - as needed, usually monthly or quarterly.
- Team meetings - at least quarterly and/or at phase completion.
- Independent Reviews - as needed; depends on the size of the project and the risk. Each state organization is encouraged to develop its own schedules and standards for quality reviews. Details on the actual independent reviews are provided in the *Independent Project Oversight document.*
- Technical Reviews - are driven by the life cycle being used and the particular stage of the project. For example, during system design, the reviews are concerned with the stage of the design and detailed design reviews, possible design walkthroughs, and peer reviews.

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Informal Review Process

The informal reviews are the processes that the project manager and key project staff set up to measure the "atmosphere" of the project.

This information can be gathered by:

- Walking the halls
- Visiting team work areas
- Sitting in on some team status meetings
- Inviting a key developer for coffee

The purpose is to get input on the project team's, stakeholders', and executive management's view of the project beyond just what is presented in the formal reviews. Having a set, consistent format limits the open exchange of information. For example, by talking with one team member, it might be discovered that a key technical staff member is very unhappy about some decisions on the project. This unhappiness has not really been formulated; it may be only a "hunch," and no one is interested in "hunches." This unhappiness might escalate to the point where a person would leave the project, and/or it could result in the development of a major problem.

Part of the project manager's strategy includes collecting information and interjecting it into the formal processes, where it can then be analyzed to determine if actions are required.

Lastly, the way a project is organized will drive the way the project is reviewed. Each key project activity needs to be tracked and reviewed as such, and the person or group responsible for the activities will need to provide input to the control process.

The rest of this document will discuss some of the structure and content of the various formal review processes.

The Status Review

The cornerstone of the project review process is the project status meeting. The emphasis of the status meeting is consistency and structure. The project team should know that this meeting is not "optional." For this reason, it is recommended that status meetings occur weekly or biweekly throughout the project life cycle. Meeting more frequently is disruptive and does not allow the project team to focus on other tasks. Meeting less frequently will allow issues to go unresolved.

Some projects set up the project status meeting on the same day, at the same time, and at the same place. Another hint is that the meeting time should be on Tuesday, Wednesday or Thursday to avoid Mondays and Fridays, since these days are frequently taken off and generally produce rescheduling issues.
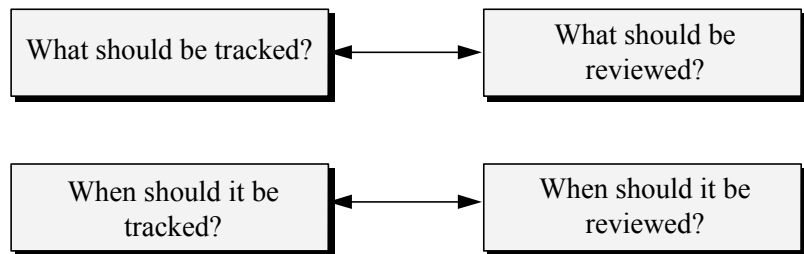
This way, participants can set their schedule, and the schedule forces a routine to be established. Consistent meetings also drive a discipline into the project organization.

Meeting Considerations

The **first status meeting** serves as a training session for the status meeting participants. The training session covers how future meetings will be conducted and what each participant's roles and responsibilities will be during and after the meeting. Each member should have at least one or two backups and should attend the first meeting.

Preparation for this meeting is critical and should map to the status report generation that was discussed in the *Tracking and Monitoring Project Activity section* and is depicted below.

Tracking and Monitoring

What should be tracked?	What should be reviewed?
When should it be tracked?	When should it be reviewed?

The following should be covered in the first meeting:

- How are risks to be managed and reported on?
- How will changes and issues be tracked and reviewed?
- The tracking tools and processes. Who will keep the schedule and cost information, and how will it be updated for review?
- The lessons learned from other projects.
- The baseline plan.

Attendees should be specifically selected and the numbers limited. They should consist of individuals who can provide status information and contribute to issues, risks, and general status discussions.

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As a guideline, if the project team is small, then the full project team may attend. If the project team numbers 10 to 24, then only lead team members (planning, development, test, quality, etc.) should attend. For projects larger than 25 members, attendees should be the team leader and the person performing the training.

The bottom line is that the persons attending the meeting communicate the status of the project activities and action items for their assigned area of responsibility. However, the number of attendees should be controlled so that the group is not too large to be productive.

A *location* should be selected that will provide the fewest disruptions. It should not be in someone's office, if possible, or in a public area. A private conference room where telephones (cellular and office) can be controlled is a good location.

Disruptions cause the meeting to appear disorganized and cause the length to extend. This results in people not wanting to attend because it is viewed as a "waste of time."

An *agenda* that is set with given timeframes is important; a sample agenda is provided below.

Status Meeting Agenda
Project X

Meeting Date: April 10, 1995 (Monday)		Meeting Time: 2:00 pm to 4:30 pm Total Time 2.5 Hours
Meeting Location: Main Conference Room		Attachments: None
Leader: L. White (Project Manager) Bud Smith (Alternative)		Note Taker: R. Green Laurie Davis (as needed)
Attendees: C. Cooke L. White B. Davison R. Wise M. Strawn	R. Chapman T. Elsmore R. Tom J. Bicknas G. Kennon	Please Bring or Prepare: 1. All outstanding project issues and change requests 2. Any written documentation pertaining to activity deviations or new risk elements. **3.** Standard project status report and attachments.

Purpose of Meeting: The purpose of the Project Status Meeting is to coordinate the schedule, resource, and financial needs of each project team. The objective will be to share and receive data, and to make group

decisions critical to analyzing the project performance to plan. Areas of prime interest are the financial, schedule, and technical issues of each group and how they work together within the overall project structure.

Process for Meeting: It is expected that each person will be prepared to update their status report from the previous reporting period and to discuss key issues and topics. Key areas are: costs, schedules, current and next period activities, issues, and change elements, and other topics that require discussion.

Each Friday an agenda will be prepared for the Tuesday meeting. Any special topics should be submitted by 2:00 p.m. on Friday to be included on the agenda.

Agenda Item	To Be Accomplished	Person Responsible	Time Allotted
Project overview for reporting period	Inform & Discuss	L. White	15 Min.
Schedule overview	Inform & Discuss	T. Elsmore	15 Min.
Financial overview	Inform & Discuss	J. Bicknas	10 Min.
Technical overview	Inform & Discuss	G. Kennon	10 Min.
X team for project	Inform & Discuss	R. Tom	10 Min.
X team for project	Inform & Discuss	C. Cooke	10 Min.
Change Management update	Update	T. Elsmore	20 Min.
Issue list review	Update	J. Bicknas	20 Min.
Risk Management update	Update	G. Kennon	20 Min.
Other issue	As defined by presenter	L. White	20 Min.
Review of action items	Review	R. Green	5 minutes
Close Meeting	Review	L. White	5 minutes

Ground Rules for Status Meetings

Since a large percentage of project time is spent in meetings of one form or another, a set of rules should be applied to each meeting type. These rules follow standard meeting management principles:

- Come on time
- Come prepared
- Bring handouts; information should not just be in the attendee's head.
- Summarize information; do not read it.
- A list of action items and the status reports should be the by-products from the meeting. The action items and discussion topics should be written up and disseminated. If a project action item, change issue, or new risk element is mentioned, then the support person responsible for distributing the status meeting information should ensure that the responsible project team member is informed.

Since a project manager is responsible for reporting on the project's status to other levels of the organization, written materials are needed to complete the necessary reports.

If an activity is not on the schedule, then the status meeting member should address:

- Why task completion is late or early.
- What other areas are/might become impacted.
- What actions need to be taken, if any.

Executive Meeting

The project plan was developed to provide a comprehensive "road map" to achieving the objectives of the project. The plan identifies specific phases with well defined, measurable milestones that will provide management with the information necessary to assess progress against business needs. Specific deliverables were identified that require review and approval by the steering committee.

A monthly or at least a quarterly executive meeting should be held to facilitate open communications between executive management and the project manager/team.

Project Reviewing

Team Meetings

These meetings should focus on strategic business issues resulting from project performance and should consist primarily of overview information as discussed in the *Tracking & Monitoring Project Execution* section.

As part of the project plan, a schedule for activities is developed, including project-related reviewing activities. The majority of the team meetings defined here are based on major project completion dates; however, each project will be unique. For projects with short time frames, it would be impossible to complete all these team meetings. However, for long projects in the initial design and development stage, even more frequent meetings may be warranted. Provided in the next figure is a sample of how team meetings can be defined and who should attend.

Please note that in many cases, the team meetings involve more than just the project team. They may also include the project sponsor, stakeholder, external project oversight entities, and/or executive management.

For projects that include a contractor, the contractor project team would also be included in these meetings.

Team Meetings

Review Type	Test to be Reviewed	Reviewed by
Phase Review	Phase Completion Report	Project Manager, Change Control Board, Project Team, and Agency focals
Deliverables	• Policies and Procedures • Re-engineered process flows • Project Documentation • Deliverable Documentation	Project Manager, specific project team members, agency focals, quality staff and other selected support staff
Milestones	• Gap Analysis Report • System Test • Acceptance Test • Installation Complete - go, no go decision • Quality Reports	Project Manager, specific project team members, agency focals, quality staff and other selected support staff

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Link to Change and Issue Management and to Quality

As key components of the project control process, the reviewing cycle and structure are closely linked to the other control processes. The direct link to tracking and monitoring has already been discussed. However, there is also a link to the project's change and issue management and quality processes.

The formal review process is the main channel for the exchange and recording of project communications. For this reason, it is important to realize that during the planning of each type of review meeting, some element of quality or change management will be included. These processes are discussed in the next set of documents in this section.